

## Welcome to WebSelfStorage



Welcome to *WebSelfStorage*, an *Intranet* point-of-sale storage management system. This application enables you to provide fast and efficient customer service, as well as providing you with the tools necessary to effectively run your self-storage facility. Using *WebSelfStorage*, you can complete the following contracts:

Reservation quote

Confirmed reservation

Move in

Take payment

Move out

Transfer between rooms

View a contract.



With this version of *WebSelfStorage*, cash drawer balancing remains a function of BEST. *WebSelfStorage* provides a closing process that feeds transaction information to BEST® (Banking Electronic Summary Transactions).

In addition to contract processing, *WebSelfStorage* provides management tools that enable you to:

Control user sign-on

Assign rooms to an auction



Control room inventory walk around sequence

Create special customer notes

Create management reports

Complete nightly batch processing

Reprint nightly batch reports and letters

Review customer status

Reprint customer receipts.

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### Contact Information

Barbara Delahoyde  
Documentation

### E-mail address

Barb\_Delahoyde@fc.uhaul.com

### Office phone

1-800-789-3638 ext 6491  
(602) 263-6840 ext. 6491

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press and hold down the ALT key and then press A to access the ADD page. Another visual help is in the wording on the key itself. Notice that the only capital letter is the hot key. Example: Next appears as neXt on the button. The 'X', in this case, is the hot key.

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## BACK- GROUND COLORS



On some input pages, you will find several fields have a background color of blue or green.

- The blue background color means the field requires information before continuing. For example: the customer's first and last name are but two of several required input fields on the CUSTOMER INFORMATION page.
- The green background color means that at least one set requires input. For example: on the CUSTOMER INFORMATION page, you must type either the customer's social security number or other form of identification; or their driver's license information.

## BUTTONS



Each page has a set of directional buttons that enable you to move from page to page, as well as performing special task within the page.

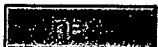
The three primary directional buttons are:

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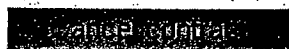
ALT + B

The BACK button enables you to move back to the previous page.



ALT + X

The NEXT button enables you to move to the next page. In some cases, you must first input information before you press the NEXT button.



ALT + C

The CANCEL CONTRACT button displays on various pages within a contract. Click on this button if you want to end the contract completely. All input, while in this contract, is discarded when you use the CANCEL CONTRACT button.

## CHECK BOXES



Check boxes can be checked and unchecked using the mouse. To do this click the left mouse button while the cursor is pointing in the box.

You can also use the keyboard to check a box. Move the cursor over the checkbox by pressing TAB. With the cursor highlighting the check box, press the SPACEBAR to check or uncheck the box.

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## HYPER- TEXT LINKS



On several pages there are small pictures called icons, as well as underlined text. When you move the cursor over these items, the cursor changes from an arrow to a pointing hand. The hand indicates a hypertext link. If you click (or in some cases double-click) on this item when the hand is visible, the application moves to the new page or new area of the existing page indicated by the hypertext link. After clicking on a hypertext link, the color of the text and underline changes to a

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different color to indicate that you have selected this hypertext link.



*regular cursor*



*hypertext link cursor*



You can print any page within this application by clicking on the print icon found on the menu bar at the top of the browser page. Press CTRL + P if you prefer to use the keyboard instead of the mouse.




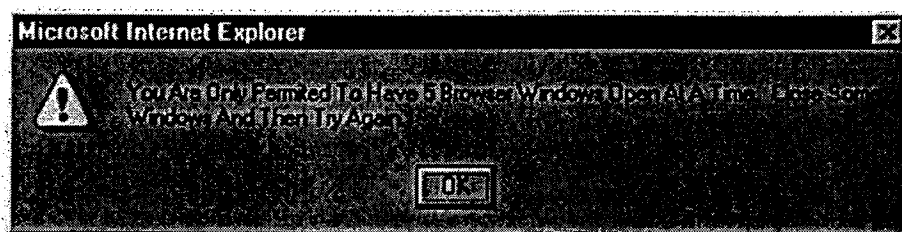
There is no auto-advance feature within this application. As you complete a field, make sure you press TAB to go to the next field. For example: If you are required to entered a date, you will notice there are three separate fields that make up the date information. The first 2-digit field is the month, the next 2-digit field is the day, and the last 4-digit field is the year. To complete entry to these fields:

1. Type the *2-digit month*.
2. Press TAB to move to day field.
3. Type the *2-digit day*.
4. Press TAB to move to the year field.
5. Type the *4-digit year*.
6. Press TAB to move to the next field.



The application enables you to have five pages open at the same time. This count does not include the main or home page. This gives you a lot of flexibility and exposure. For example: You can open more than one contract, or open a contract and look at your available rooms report at the same time. If you try to open more than five pages, the application displays the following warning message.

Click on  to continue.



Check to see if you have minimized any contract, report, or management pages.

This information is on the TASK bar at the bottom of the screen next to .

Look for any pages with the Microsoft Internet icon next to the page name.



Click on the item and this redisplay the page.





Example of TASK BAR with four Microsoft Internet pages plus the home page minimized. All are in open status.


Once you retrieve the page, complete one of the following depending on the page you are on:

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**Within a contract:**

- Click on the  to close a contract and not save the changes made during this session.
- Input the remaining contract information. On the RENTAL AGREEMENT page, click  to complete the contract.

**Within a report or management page:**

- Click  until you return to the HOME page.

As you complete a contract, close a report or close a management page the minimized button on the TASK BAR at the bottom of the screen disappears. When you have fewer than six (the STORAGE MAIN MENU or HOME page is not part of the five-page limit), then you can open additional pages.

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*Go to "Reporting problems"*

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## Terminology



Basic terms used through this guide are listed below:

- **Active Page** – The front-most page (window) on the desktop. The page that accepts any keyboard input.
- **Browser** – Software used to navigate the World Wide Web, the graphical area of the Internet.
- **Client/server** – A distributed computing system in which personal computers or workstations function as 'client' that request service from print servers, file servers, database servers, etc., which may be located at remote sites.
- **Cursor** – A rectangle or line on the screen that shows exactly where you are working.
- **Customer Type** -- U-Haul currently has four unique customers.
  - **Business** customers are set up to use a credit card as payment. These customers are also considered automatic payment customers.
  - **Corporate** customers are businesses who have established credit through U-Haul International®. These customers have a credit line, which requires an authorization number acquired through the credit card/check processing dial-up function.
  - **Individual** customers are people who rent rooms from U-Haul for personal use. These customers may choose the automatic payment option, which enables you to charge their credit card for rent and services on a regular bases. These customers may also choose to mail you a payment by check, or pay in person each period.
  - **System Use** customer is a U-Haul entity that uses a room for U-Haul business.



**Independent dealers** are excluded from SYSTEM USE designation. Dealers are business people who have a contractual agreement with U-Haul. They are not part of the U-Haul corporate structure. Dealers who rent from U-Haul can be one of the other customer types depending on their relationship with U-Haul International.

- **FAQ** – Frequently asked questions; new users tend to ask the same questions. A page within this application contains these questions and their answers for readers to print and read at their leisure.
- **Home page** – The main page where you can start a contract, create a report, view inventory, complete management functions, etc.
- **Host** – Any computer on a network that is a repository for services available to other computers on the network.
- **Hypertext link** – An icon or underlined text that when clicked on takes you to another page or different area on the current page.
- **Interface** – The method of using software, often described as 'text-based' or 'graphics-based.' The term also can refer to a common or shared boundary between instruments, devices or systems that enables exchange of information among devices.

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- **Internet** – The Federal Networking Council gives the following definition: “The global information system that (i) is logically linked together by a globally unique address space based on the Internet Protocol (IP) or its subsequent extensions/ follow-ons; (ii) is able to support communications using the Transmission Control Protocol/Internet Protocol (TCP/IP) suite or its subsequent extensions/follow-ons, and/or other IP-compatible protocols; and (iii) provides, uses or makes accessible, either publicly or privately, high level services layered on the communications and related infrastructure described herein.”
- **Intranet** – An internal or company-operated Internet that can be used only by those who are directly connected to the company’s computer network.
- **Login** – As a noun, it refers to the name used to gain access to a computer system. As a verb, it means the act of entering a computer system.
- **Network** – Two or more computers sharing resources.
- **PC** – Personal computer; used in reference to IBM-compatible machines.
- **User ID** – Each user that is permitted to use the application must have a code that uniquely identifies them to the computer. In *WebSelfStorage*, you are required to enter your social security number or some other identification word or number combination. Enter this code followed by a password when logging in.
- **Web page** – A document containing information and requiring input, which can be seen on the Internet by using a browser program such as Microsoft® Internet Explorer.
- **Windows** – Application software using graphical user interface.
- **World Wide Web** – (also WWW) Part of the Internet that offers graphics and user hypertext links to point users to additional information.

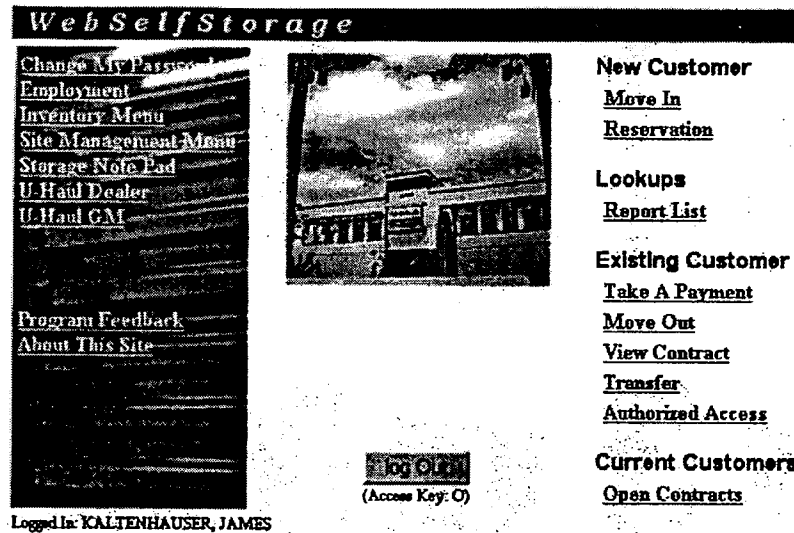
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[Go to "WebSelfStorage Overview"](#)

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Example of Main Menu page.

Each user is assigned a list of functions they can perform. For this reason, the screen view varies according to the user's security clearance.



## Storage Main Menu (Home Page)



The MAIN MENU, or HOME page, is partitioned into two primary sections. The information to the left of the screen, with an orange storage door image as background, provides you with the management section of the application. The selections in the white on the right side of the screen provide you with transaction processing and reporting.

Notice your name appears under the orange storage door image in the lower left corner of the page. This identifies the current login user. Make sure you check this each time before you begin to use the application. If you are not the login user displayed on the page, log out and log in under your id and password.

Below is a brief definition of each selection. Certain selections may not be available to you depending on your access rights.



### CHANGE MY PASSWORD

- Enables a user to establish a new password anytime.

### EMPLOYMENT

- Still under construction.

### INVENTORY MENU

- Provides a page to review room inventory and change the walk around order of specific rooms.
- Provides a page for setting up auctions (only available to storage manager at the marketing company).

### SITE MANAGEMENT

- Provides a screen to add, edit and review user information.
- Provides an opening process that prints reports and letters from the

prior night's batch process.

- Provides a closing process that sends a transaction file to BEST for processing and completes the nightly batch process.
- Provides a full security gate update function that interfaces with PTI Falcon or DIGIGATE 102, sending these external software applications the room and customer status for room inventory.
- Provides a screen to manually input existing customer and contract information.

#### STORAGE MESSENGER

- Provides a way of sending notes between centers and marketing companies.

#### STORAGE NOTE PAD

- Provides a note pad screen where a short note to a customer can be typed and printed. This note is not saved.

#### U-HAUL DEALER

- Link to dealer lookup page.

#### U-HAUL GM

- Link to the U-Haul General Managers' web site.

#### TRAINING

- Provides instructional pages to help you learn how to use this application.

#### WEBCARD

- Link to Dealer equipment rental application.

#### ROOM/TRUCK EQUIVALENCY CHART

- Provides instructional pages to help you learn how to use this application.

#### PROGRAM FEEDBACK

- Provides a way for you to communicate issues and concerns to the development team at U-Haul International.

#### ABOUT THIS SITE

- Provides a list of system members who are on the *WebSelfStorage* development team at U-Haul International.

#### MOVE IN

- Enables you to complete a move in contract.

#### RESERVATION

- Enables you to complete a QUOTE or CONFIRMED reservation, change an existing reservation, or review a remote reservation you received from the Sales and Reservations Department at U-Haul International or another authorized storage location.



#### TAKE A PAYMENT

- Enables you to record the payment on an existing contract.

#### MOVE OUT

- Enables you to record the moving out of an existing customer. A move out can only be done when the customer is current with their payment, or after the entire balance due is written off.

#### VIEW CONTRACT

- Enables you to review an existing customer's contract, including viewing and printing the ledger, or reprinting a customer receipt.
- Enables you to recall a reservation contract and complete a move in.
- Enables you to recall a reservation quote and collect a deposit changing the status of the reservation to "confirmed."

#### TRANSFER

- Enables you to move a customer from one room or rooms to another room or rooms. This process prorates existing payments carrying any unused money to the new room.

#### AUTHORIZED ACCESS

- Provides a list of people who have security access to the room.

#### OPEN CONTRACTS

- Provides a list of contracts you currently have opened.

#### REPORT LIST - Provides the following reports:

- AUTO PAYMENT CUSTOMERS REPORT - a complete list of all customer who authorize you to use their credit card as payment.
- CASH DRAWER SUMMARY REPORT - enter a specified date range to view transactions completed for this period.
- COLLECTION WORKSHEET - enter a specific number of days late to see customer information and balances due on delinquent rooms.
- DOWNLOADED RESERVATIONS REPORT from the Sales and Reservations Department.
- EXPIRING CREDIT CARDS REPORT - enter a specific number of days prior to the date expired to view customers' credit card information. Use this report to call customer and update their contracts before the credit card expires.
- FACILITY UTILIZATION REPORT for the current day. Provides a recap of rooms rented, earned income and potential income lost because of delinquencies and vacant rooms.
- FAILED AUTO PAYMENTS REPORT listing all credit card transactions that failed during the nightly batch process. Reasons

vary from expiration dates in the past to credit card declined by authorization center.


- INVOICING CUSTOMERS REPORT is a list of all customers requiring invoice billing.
- LOCK ACTION REPORT is a list of customers with a change in lock action for a specified date range.
- MOVE OUT REPORT listing all customers who have specified their move out date on a contract.
- NIGHTLY BATCH LETTERS provides a list of letters that were generated for a designated date.
- NIGHTLY BATCH STATUS REPORT provides the results of this process for a designated date.
- NO SHOW RESERVATIONS REPORT provides a list of reservations for a specific date that were not used by the customer and have been removed from your system.
- RENT ROLL provides detail customer information; move in date; paid through date; number of days occupied; and balance owed.
- ROOMS AVAILABLE REPORT provides a list of rooms by size code and rate that are available to rent.
- SAFESTOR COVERAGE REPORT provides a list of customers who pay for this protection.
- SECURITY ACCESS CODES provides a list of customers and their PTI security access codes.
- SECURITY ACCESS IN/OUT provides a history of when each customer entered and exited the storage facility. (Not yet in production.)
- UNIT MIX REPORT provides the occupancy/vacancy mix report for a specified date.
- UNIT PRICE LIST REPORT provides a recap of the different size codes at your facility and the price associated with each size code.
- WALK AROUND SEQUENCE REPORT provides you with your room inventory in walk around sequence, as well as the lock-status of each room.

Passwords can be alphabetic, numeric or a combination of both.

Press TAB or click in the next field to move between fields.

A list of the two-digit state abbreviations can be found in the appendix section of this manual. See state abbreviations within the APPENDIX-QUICK REFERENCE section



Click  next to the RIGHTS. This displays all rights available.

<b>Rights:</b>	GENERAL MANAGER
<b>Notes:</b>	GENERAL MANAGER
	ASSISTANT GENERAL MANAGER
	SITE STORAGE MANAGER
	CUSTOMER SERVICE REP
	SALES & RESERVATIONS

Click on the name of the RIGHT; or press the DOWN-ARROW key until the cursor is over the RIGHT, press ENTER to select this RIGHT.

**Note:** Access rights are established and controlled at U-Haul International.

**Currently, a center has five levels.**

The SALES & RESERVATIONS level is for system members who complete remote and local reservations only.

The CUSTOMER SERVICE REP level is for counter personnel who complete storage transactions.

The SITE STORAGE MANAGER level, as the name implies, is for the system member who maintains the storage facility at the center level.

The ASSISTANT GENERAL MANAGER level is for the system member who manages the store when the general manager is not there.

The GENERAL MANAGER level is for the center manager at this facility.

**Currently, a marketing company has four levels as well:**

The MARKETING COMPANY PRESIDENT level is for the MCP to view all centers' information.

The MCO EXECUTIVE ASSISTANT level is for the system member who helps support all center locations.


The MCO FACILITY MAINT. level is the system member at the marketing company who maintains all construction and repair for the marketing company and its centers.

The MCO STORAGE MANAGER is the system member who is responsible for overseeing all storage locations including the scheduling of auctions.

The SALES & RESERVATIONS level is normally used by the Sales & Reservations department at U-Haul International to create remote reservations.

Each level has rights to specific pages according to the job description. If you have difficulty completing your job because of restrictions on your access rights, talk with your supervisor or manager. If the consensus is that more flexibility is

**To deactivate a user access account from the list page:**

1. Type the *first few letters of the first name and/or last name* of the user in the corresponding field on the LOOKUP A STORAGE ACCESS USER page.
2. Press ALT + X. A list of records appears.
3. Press TAB until the cursor is over the picture frame icon  to the left of the record.
4. Press ENTER.
5. Press TAB, on the detail page, until the cursor is over the checkbox ☒ **Deactivated Account** at the top of the page.
6. Press the SPACEBAR to check the box.
7. Press ALT + S to save.
8. Press ALT + B to return to the MAIN MENU.

**Reviewing room inventory**

Room inventory is captured in the conversion program. This program takes all rooms, applying the right sizecode and rate to each room. Only single rooms are converted. The UHI storage group has to re-establish combined room inventory for you.




**To review inventory using the mouse:**

1. Click on INVENTORY MENU on the left side of the HOME page.
2. Click on ROOM INVENTORY on the INVENTORY MENU page.



**To review inventory using the keyboard:**

1. Press TAB until the cursor is over INVENTORY MENU on the left side of the HOME page.
2. Press ENTER.
3. Press TAB until the cursor is over ROOM INVENTORY.
4. Press ENTER.
5. Press TAB until the picture frame icon  next to the room you want to edit is highlighted.
6. Press ENTER.

This is an example of the INVENTORY MENU page. Depending on your security access, you may have other selections as well as ROOM INVENTORY.

**Inventory Menu**

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Room Inventory

Click On An Underlined Item To View



















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Test

(Access Key: B)

The ROOM INVENTORY page displays.

The rooms are listed in ascending numeric order.

Room Inventory					
Facility: 828061			Date: 4/25/2001		
	ROOM SIZE	DESCRIPTION	STATUS	COMMENTS	RATE
	102 5X10X8	1 SINGLE NOCLIMATE	VACANT		\$64.95
	103 5X10X8	1 SINGLE NOCLIMATE	VACANT		\$64.95
	104 5X10X8	1 SINGLE NOCLIMATE	OCCUPIED		\$64.95
	105 5X10X8	1 SINGLE NOCLIMATE	DELINQUENT		\$64.95
	106 5X10X8	1 SINGLE NOCLIMATE	OCCUPIED		\$64.95
	107 5X10X8	1 SINGLE NOCLIMATE	DELINQUENT		\$64.95
	108 5X10X8	1 SINGLE NOCLIMATE	OCCUPIED		\$64.95
	109 5X10X8	1 SINGLE NOCLIMATE	OCCUPIED		\$64.95
	110 5X10X8	1 SINGLE NOCLIMATE	OCCUPIED		\$64.95
	111 5X10X8	1 SINGLE NOCLIMATE	OCCUPIED		\$64.95
	112 5X10X8	1 SINGLE NOCLIMATE	OCCUPIED		\$64.95
	113 5X10X8	1 SINGLE NOCLIMATE	OCCUPIED		\$64.95
	114 5X10X8	1 SINGLE NOCLIMATE	OCCUPIED		\$64.95
	115 5X10X8	1 SINGLE NOCLIMATE	OCCUPIED		\$64.95
	116 5X10X8	1 SINGLE NOCLIMATE	DELINQUENT		\$64.95
	117 5X10X8	1 SINGLE NOCLIMATE	OCCUPIED		\$64.95
	122 5X10X8	1 SINGLE NOCLIMATE	OCCUPIED		\$64.95
	123 10X10X8	1 SINGLE NOCLIMATE	OCCUPIED		\$84.95



To view and make changes to the walk around sequence:

1. Click on the picture frame icon to the left of the room you want to edit.

or


Press TAB until the cursor is over the picture frame icon of the room you want to edit. Press ENTER to select.



The term WALK AROUND refers to the sequence in which you walk the facility. Setting up the walk around sequence is useful if you use the WALK AROUND REPORT each morning to walk your facility. This report enables you to check the status of each room. It is a tool to assure that WebSelfStorage has the same access lock status as the physical rooms. To review the WALK AROUND REPORT click [here](#).



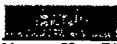

### To update walk around sequence using the mouse:

1. Press INSERT to set the field to otype.
2. Type the *new walk around sequence number* in the WALK SEQ field.
3. Press INSERT again to turn off the otype feature.
4. Click on  to update the record.



### To update walk around sequence using the keyboard:

1. Press INSERT to set the field to otype.
2. Type the *new walk around sequence number* in the WALK SEQ field.
3. Press INSERT again to turn off the otype feature.
4. Press ALT + S to update the record.






Room Inventory Worksheet	
Entry: 990019	Rate: \$99.95
ROOM: 101	SIZECODES
WALK SEQ: 101	5X5X8 SC-10 1 SINGLE NOCLIMATE
EFF DATE: 1/2/2001	BONUS
STATUS: DELINQUENT	
 	
(Access Key: B) (Access Key: S)	

### Understanding combined rooms



A combined room is two or more rooms that have been designed as 'combined' by the U-Haul Storage Production Group at U-Haul International. When the Storage Production Group combines rooms, the individual rooms are no longer available to rent. The only available room is the combined room.

**Note:** The individual rooms cannot be rented until the combined room is vacant and the Storage Production Group unlinks the rooms. If you have a combined room that is no longer occupied and you want to rent one of the rooms, contact the Storage Production Group and ask that they unlink the rooms.

	1343 5X10X8	1 UPPER CLIMATE	OCCUPIED	\$64.95
	1344 10X10X8	1 UPPER CLIMATE	OCCUPIED	\$104.95
	1345 5X10X8	1 UPPER CLIMATE	DELINQUENT	\$64.95
	1346 5X10X8	1 UPPER CLIMATE	OCCUPIED	\$64.95
	1347-49 10X10X8	1 UPPER CLIMATE	VACANT	1347, 1349 \$104.95

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An example of a combined room is shown above. Room # 1347-49 is really two rooms, 1347 and 1349, combined into a new room with a new rate. Notice the individual room numbers are listed in the second to the last column on the ROOM INVENTORY page.

*Reviewing all customer and contract information*



Compare the RENT ROLL REPORT in *WebSelfStorage* to Domico's report. Make sure each customer's name, move in date, room number, current rate, and paid through date are the same as Domico's.

Compare the COLLECTION WORKSHEET in *WebSelfStorage* to Domico's report. Make sure each customer's name, room, paid through date, fees and rent due, as well as total due are accurate. Check to make sure the days late is the same on both reports.

Compare the UNIT PRICE LIST BY SIZECODE in *WebSelfStorage* to Domico's report.

Compare the UNIT MIX REPORT in *WebSelfStorage* to Domico's report.

## *Adding Pre-existing Customers*



Occasionally a customer's record may have errors that cannot be corrected within the contract. An example would be if the PAID THROUGH DATE is no longer correct. When this occurs, the only option is to clear the customer's record by completing a move out. Once the move out is completed, then a MANUAL CONVERSION contract can be done.

The MANUAL CONVERSION process is also used at storage facility that are newly acquired by U-Haul. If your storage location does not use Domico, the MANUAL CONVERSION process must be used to record existing customer information into *WebSelfStorage*.

## *Adding Existing Customer / Contract Information*



Before you start recording customer contracts in *WebSelfStorage* you must retrieve the following information from each customer file:

The customer's name, address, phone number, driver's license, social security or secondary identification number.

The customer type – Example: Individual, business, corporate move, or system use.

The alternate contact or contacts' name, address, and phone number.

Any other person who has access to the room.

The room or rooms the customer is renting.

The current paid through date for each room.

The room rent, if different from UHI established rate.

The customer's balance.

The next bill date.

Any services used – Example: Safestor or invoice billing.

A unique security gate access code and zone.

If customer is set up for automatic payment using their credit card, need their credit card number and the expiration month and year.

If customer is set up for invoice billing.

The status of this account. Example: current, first delinquency, second delinquency, in lien status.



**To input a customer's contract thru the MANUAL CONVERSION process using the mouse:**

1. Click on SITE MANAGEMENT MENU.
2. Click on MANUAL CONVERSION to view the CHOOSE A CUSTOMER



TYPE page.

3. Click on CUSTOMER TYPE of the customer you are entering.  
Note: This demonstration uses the screens and functions of an INDIVIDUAL CUSTOMER TYPE.



4. Click  to continue.



To input a customer's contract thru the MANUAL CONVERSION process using the keyboard:

1. Press TAB until the cursor is over SITE MANAGEMENT MENU.
2. Press ENTER.
3. Press TAB until the cursor is over MANUAL CONVERSION to view the CHOOSE A CUSTOMER TYPE page.
4. Press ENTER.
5. Press UP or DOWN ARROW to move cursor over the CUSTOMER TYPE.
6. Press ALT + X to continue.

Example of  
CHOOSE A  
CUSTOMER  
TYPE page

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
<div>Choose a Customer Type</div> <ul style="list-style-type: none"><li><input type="radio"/> Business</li><li><input type="radio"/> Corporate</li><li><input checked="" type="radio"/> Individual</li><li><input type="radio"/> System Use</li></ul> <div> </div> <div>(Access Key: B) (Access Key: X)</div>							

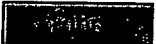
The next step is to add the customer information. The customer database grows as you input customers. Once a customer is input, you never have to add them a second time. For this reason, the next page asks for the first and last name of the customer.

## Completing a regular customer search



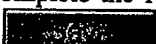
Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
↑ <b>Search Customer Information</b>							
First Name:				Last Name:			
(Access Key: C) (Access Keys: B) (Access Keys: F)							
(Access Keys: A)							

### To search for a customer:

1. Type the complete *customer's first and last name*, or a portion of either the *first or last name* in the fields indicated.
2. Click  to continue the search.



If the customer's record is found it displays on the **INDIVIDUAL CUSTOMER INFORMATION** page.

If the customer's record cannot be found, the **INDIVIDUAL CUSTOMER INFORMATION** page displays with the customer name appearing in the proper fields. In this case, you would need to complete the form, adding all customer information to the page before clicking on .

This is an example of the page that displays when a customer record is not found. Type the remaining customer information in each field. Press TAB to move between fields. Click



or press ALT + S when you are done.

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
↑							
<b>Individual Customer Information</b>							
First Name:		Last Name:					
Address:		Apt No:					
Address2:							
City:		State:		Zip:			
Home Phone: ( ) -		Ext:					
Work Phone: ( ) -		Ext:					
SS# or Secondary ID:							
Driver Lic. or State ID:		State:		Exp Date:			
Employer Name:		Phone: ( ) -					
E-Mail Address:							
Tax Exempt		Number:					



Notice the blue and green-background colors on several fields. The blue-background means that the field must have some information entered before you can save it. The green-background, on the CUSTOMER INFORMATION page, requires you enter either a social security number or secondary id; or the customer's driver's license information.

### Completing an advanced customer search



You can also do an advance search, which is similar to the contract search done within a MOVE IN, TAKE PAYMENT, VIEW CONTRACT, TRANSFER, or MOVE OUT contract.

#### To complete an advance search:

1. Click on the **Advanced Search** or press ALT + A.

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
----------	---------	--------------	------	-------------	--------------	-----------	---------

↑

### Search Customer Information

E-Mail Address:

Unique Customer ID No:

First Name:  Last Name:

State:  City:

Social Security or Secondary ID:

Phone Number:  -  -


Driver's License or State ID No:

(Access Key: C) (Access Key: B) (Access Key: F)

### Choosing a customer from a list



If more than one customer matches the criteria entered, the **INDIVIDUAL CUSTOMER RESULTS** page displays with all customers listed.


Click the  blue-arrow icon next to the customer you want to use, or press TAB until the cursor is over the blue-arrow icon, then press ENTER to select.


Customer	Location	Room	Move-In Date	Payment	
↑					
Individual Customer Results					
NAME	PHONE	ADDRESS	CITY	STATE	ZIP
DAVE LONEWOLF	(602)938-9382	1922 N. 44TH STREET	TEMPE	AZ	93829
DAVID BARBER	(480)323-1552	1858 WESTWIND DR.	PHOENIX	AZ	85206
DAVID JONES	(602)938-3298	2233 N. 44TH STREET	TEMPE	AZ	83982
DENNIS O'CONNOR	(480)844-2849	1630 EAST GLENCOVE ST	MESA	AZ	85203

**▶ = Select The Customer**

(Access Key: B) (Access Key: A)



If the customer information you want does not display, you can click  or press ALT + A to add the customer information for the first time.

If you want to re-enter your search criteria, click  or press ALT + B to go back to the search input screen.

## Adding a new customer

The  
INDIVIDUAL  
CUSTOMER  
INFORMATION  
page provides  
you with the  
fields needed  
to add a new  
customer.

Customer	Location	Room	Move-In Date	Payment
<b>Individual Customer Information</b>				
First Name:		Last Name:		
Address:		Apt No:		
Address2:				
City:		State:	Zip:	
Home Phone: ( ) -		Ext:		
Work Phone: ( ) -		Ext:		
Social Security No:				
Driver's Lic. No:		State:	Exp Date: /	
Employer Name:		Phone: ( ) -		
E-Mail Address:				
Tax Exempt <input type="checkbox"/> Number:				


Notice the blue and green background fields. The blue-background fields require input, while the green-background field, on this page, require either the customer's social security number or other identification number; or the customer's complete driver's license information. This includes their license number, state, and expiration date



A complete list of state codes can be found in the quick reference section of this manual.



### To input customer information using the mouse:

1. Click in the field you want to input information.
2. Type the corresponding information in the field.
3. Repeat steps 1 and 2 until all fields are input.
4. Click  when done.



### To input customer information using the keyboard:

1. Press TAB until the cursor is in the field you want to input.
2. Type the *corresponding information* in the field.

3. Repeat steps 1 and 2 until all fields are input.
4. Press ALT + X when done.

### *Entering alternate contact on a pre-existing customer contract*



The next step in the MANUAL CONVERSION process is to add the alternate contact information. An alternate contact is important for two reasons. First, it gives you another person or persons you can notify in case of an emergency. Second, in some states, the law requires a contact person be kept on file when renting a storage room.

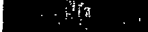
*Since you may be converting data at a center that does not use Domico, in some cases you may not have an alternate contact available.*

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
↑ <b>Alternate Contact Question For Domico Conversion</b> Do You Have Alternate Contact Information For This Customer? (Access Key: B) (Access Key: Y) (Access Key: N)							

*To accommodate this, a question page displays.*



**To continue when you do not have alternate contact on file for this customer:**

1. Click  or press ALT + N. Continue with completing process with no alternate contact.



**To continue when you do have alternate contact information on file for this customer:**

1. Click  or press ALT + Y. Continue with completing process with alternate contact.

**To return to the CUSTOMER INFORMATION page:**

1. Click  or press ALT + B.

## Adding Rooms



The next step is to add all rooms rented by this customer.

Example of  
AVAILABLE  
ROOMS page.

Customer   Contact   Access Users   **Room**   Gate Access   Payment Plan   Invoicing   Payment

↑

**Available Rooms**

Input The Desired Room #  (Access Key: A)

- or -

Select A Product Type  (Access Key: D)

- or -

Select A Room Size  (Access Key: V)

(Access Key: C)    (Access Key: B)

The AVAILABLE ROOMS page provides you with three options to add a room.

### If you know the room number:

1. Type the *room number* in the INPUT THE DESIRED ROOM # field.
2. Click  or press ALT + A to add.

Customer   Contact   Access Users   **Room**   Gate Access   Payment Plan   Invoicing   Payment

↑

Select The Desired Room From The List Below

ROOM	SIZE	PRODUCT	DESCRIPTION	RATE
<input type="checkbox"/> 2901	XXXX	CRATE	3 SINGLE HEATED	\$5.95
<input type="checkbox"/> 595	XXXX	CRATE	5 SINGLE NOCLIMATE	\$29.95

☐ Select The Room    (Access Key: B)

### If you know the product type:

1. Click on an item within the list SELECT A PRODUCT TYPE on the left side of the page.
2. Click  or press ALT + D to view a list of rooms for this product type.
3. Click on the ☐ blue-arrow icon next to the room you want to add.

### If you know the room size:

1. Click on a size within the list SELECT A ROOM SIZE on the right side of

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### 3. Past due.

If a customer is current with no balance owed or overpaid, then the RENT/SERVICES DUE, FEES DUE, and CREDIT BALANCE all are zero. In this case, the PAID-THRU DATE is set to a date in the future.

If a customer is past due, an amount is required in the RENT/SERVICES DUE and possible the FEES DUE fields

RENT/SERVICES DUE requires the total amount the customer owes on rent, recurring and one-time charges. This amount also includes all sales tax associated with these charges. In this case, the PAID-THRU DATE is set at a date in the past. In the above example, the customer paid through January 31, 2001. The customer owes:

A month's rent	\$39.95	<i>60.75 should be typed in the RENT/SERVICES DUE field in the example above.</i>
7% tax on the rent	2.80	
A month's <u>Safestor charge</u>	<u>18.00</u>	
TOTAL	60.75	

FEES DUE is the total amount of delinquency and lien sale charges applied to this account. These fees have not been paid. In the example about, the customer is 28 days late. The first and second delinquency fees have been charged to this account. Each delinquency fee is \$15.00; therefore, the customer owes \$30.00 in fees.

CREDIT BALANCE is used when a customer is current and has paid more money than was owed with the last charge. This is an overpay balance. In this case, the PAID-THRU DATE is always in the future, and the RENT/SERVICES DUE and FEES DUE fields must remain zero.



Although it is not required, if you have the customer's projected move out date, it can be added to the EXPECTED VACATE DATE field. This is helpful if you want to utilize the EXPECTED VACATE REPORT, also available within this application, to help you manage your occupancy rates. Click [here](#) to review this report.



The final step, on this page, is to add all services associated with this room. A list of these services appears below the room information. Next to each service is a check box. Check each box that applies to this customer. In the example above, the customer has SAFESTOR \$10,000 included on his account. The items checked do not add to the balance owed, they are used by *WebSelf Storage* to

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Selected Room And Services Information						
ROOM	SIZE	PRODUCT	DESCRIPTION	SQ.FT.	BILL	RENT
571	10X5X8	SC-10	1 SINGLE NOCLIMATE	50	1/31/2001	\$38.95
RECURRING SERVICES						AMOUNT
SAFESTOR \$10,000						\$18.00

You can adjust the RENT and/or SERVICE AMOUNT if the ones shown on this page are incorrect.

 = Add Services To Room  = Delete A Room And/Or Services

#### ROOM

Click on the picture frame icon next to the ROOM title if the rate that displays under RENT on this page is incorrect.

All rental rates that are less than the standard rate will have a rate change applied in the first nightly batch process after this conversion. Continue with adjusting room rate below.



#### RECURRING SERVICES

Click on the picture frame icon next to the RECURRING SERVICES title if a rate on one or more services is incorrect. Continue with adjusting recurring service fee below.



#### Adjusting room rate

Type the correct rate in the RENT field. Click

or press ALT + S to save this change.

Adjust The Room Rental Amount					
ROOM	SIZE	PRODUCT	DESCRIPTION		RENT
571	10X5X8	SC-10	1 SINGLE NOCLIMATE		\$38.95

(Access Key: B) (Access Key: S)

#### Adjusting recurring service fee

Type the correct charge in the AMOUNT field. Click

or press ALT + S to save this change.

Adjust Service Item Amount				
DESCRIPTION	ROOM	START DATE	NEXT DUE	AMOUNT
SAFESTOR \$10,000	571	2/1/1999	1/31/2001	\$18.00

(Access Key: B) (Access Key: S)

After adding all rooms with services and adjusting needed rates, click



or press ALT + X to continue.

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## Completing the pre-existing customer contract

### The MANUAL CONVERSION

RECAP page shows all charges and the current balance. Make sure this information is accurate before continuing. Use the

**Back**

button if you need to return to a page and adjust any dollars or room information.

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
<b>Manual Conversion Recap</b>							
ROOM	THRU DATE	DESCRIPTION	RATE	RENT/SRV DUE	FEE DUE	BAL	
554	3/31/2001	RENT	\$39.95		\$0.00	\$0.00	\$0.00
554	3/31/2001	SAFESTOR \$10,000	\$12.00		\$0.00	\$0.00	\$0.00
						<b>Room Balance:</b>	\$0.00
Set Customer Status To Current, Delinquent, Or Lien							
<b>CURRENT</b>							
						<b>Credit Balance:</b>	\$0.00
						<b>Contract Balance:</b>	\$0.00
<div style="display: flex; justify-content: space-around;"> <div><b>Cancel contract</b> (Access Key: C)</div> <div><b>Back</b> (Access Key: B)</div> <div><b>Save manual move in</b> (Access Key: S)</div> </div>							

<b>CURRENT</b>
Choose:
<b>CURRENT</b>
FIRST DELINQUENCY
SECOND DELINQUENCY
THIRD DELINQUENCY
LIEN

Click on the ☐ under the SET CUSTOMER STATUS TO CURRENT, DELINQUENT OR LIEN. Select the customer's status.

A customer is current if their paid through date is in the future and their balance due is zero, or there is a credit balance.

A customer is in first delinquency if the first late fee has been applied.

A customer is in second delinquency if the first and second late fee has been applied.

A customer is in third delinquency if the customer has been sent a lien sale warning notice.

A customer is in lien if the customer has been notified that an auction is pending. The sale of their goods will occur if the customer does not make payment on all outstanding charges.

To save this manual move in, click **Save manual move in** or press ALT + S.

Go to "Customer contracts"

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## Viewing the RENTAL AGREEMENT page

The RENTAL AGREEMENT is the main page.

The eight titles in blue provide links to all pages used in a contract.

– Example:

!! Customer Information

**Note:** For Corporate Move and Business Account Customer, and System Use customers there are nine titles.

WebSelfStorage

RENTAL AGREEMENT

CONTRACT BALANCE DUE: \$0.00 ACCOUNT TYPE: INDIVIDUAL CONTRACT NO: 990019-00000671

<u>!! Customer Information</u>
<u>!! Alternate Contact</u>
<u>!! Authorized Access Person(s)</u>
<u>!! Room Information</u>
<u>!! Services</u>
<u>!! Credit Card Payment Plan - Optional</u>
<u>!! Payment Ledger</u>
<u>!! Notes</u>

(Access Key: C)

(Access Key: S)

In the example above, notice several of these titles are underlined while others are not. The underlined items are hypertext links to completed pages containing information. The application keeps track of what you have input and allows you access pages only in a logical sequence. For example, you cannot add a room until you have first added a customer and in some cases an alternate contact. You cannot add a payment if there is no customer or room information.

In addition to these hypertext links, you can review information on this page by clicking the blue, down-arrow icon next to the hypertext link name. This drops down the section and allows view-only access. To open up all view-only sections at one time, click the light-blue, down-arrow icon in the upper-right corner of the page.

Click any of the underlined titles to go to that part of the contract.

or

Use the TAB and ENTER keys to move to these pages.

## Using icons within a contract








Notice the contract icons in the upper-right corner of the RENTAL AGREEMENT page.



These icons also are hypertext links. Each takes you to a different page within the contract.



- View a list of customer letters by clicking on this icon. For detailed procedure, click customer letters.
- Add a note about this customer by clicking on this icon. This note page is confidential. Your comments do not print on any receipt or report. For detailed procedure and additional information, click customer notes.


-  Collect payment from the customer by clicking on this icon. If the customer's PAID THROUGH DATE is not in the future—meaning the customer owes money, a “payment contract” must be done before a MOVE OUT or TRANSFER. Within this payment contract, you can collect money and, if you have the proper security clearance, write off all or some of the amount owed.
-  Move the customer out of the room by clicking on this icon. Can only be done from this icon when the customer is current and his or her PAID THROUGH DATE is in the future. When a customer owes money before moving the customer out, collect a payment for the amount owed, or write off the balanced owed. Finish this “payment contract.” From the HOME page, retrieve the contract using the MOVE OUT selection.
-  Transfer from one room or rooms to another room or rooms by clicking on this icon. A transfer can only be done from this icon when the customer is current and his or her PAID THROUGH DATE is in the future. If the customer is not current, collect payment or write off the amount owed. Once this “payment contract” is done, click on TRANSFER from the HOME page.
-  The light-blue down-arrow icon displays view-only information for all sections on this page.  The light-blue up-arrow icon is a toggle switch. Use it to close all opened view-only sections. To close the view-only information, simply click the up-arrow. The down and up-arrow toggle switch feature is also available on each of the levels of the contract. Example: To see view-only information for the customer, click the down-arrow next the CUSTOMER INFORMATION name.



To return to the move in process, click [here](#).

#### Viewing customer letters



All letters generated to a particular customer can be view from the RENTAL AGREEMENT page. Click on the letter with magnifying glass icon  at the top, right corner of the page.

This provides a list of all letters for the specific customer by room, it shows the type of letter created, what date it was generated and printed. To view a letter, click on the underline letter name.


Generated Letters			
ROOM	LETTER	PRINTED	GENERATED
922	<u>OVER PAYMENT</u>	2/21/2001	2/21/2001
922	<u>1 DELINQ</u>	4/2/2001	3/26/2001
922	<u>2 DELINQ</u>	4/9/2001	4/2/2001
922	<u>1 DELINQ</u>	4/16/2001	4/12/2001
922	<u>2 DELINQ</u>	4/16/2001	4/12/2001
922	<u>3 DELINQ</u>	4/16/2001	4/12/2001
922	<u>LIEN</u>	4/16/2001	4/16/2001

**Back**  
(Access Key: B)

The letter displays on a separate page.

The menu bar provides you with buttons to use for printing and exiting this page when done.

Click  to print the letter again.

Click  to return to the previous page.

Generated Letter - Microsoft Internet Explorer

Back Forward Stop Reload Home Search Favorites History

CMD DALLAS  
920 MEYERS ROAD  
GRAND PRAIRIE, TX 75030  
Phone #: (000)000-0000

Date: 4/20/2001

LATE NOTICE

MICHAEL MCCULLOCH  
2727 N CENTRAL AVE  
PHOENIX, AZ 85004

Dear MICHAEL MCCULLOCH,

We have not received your monthly payment for storage room #616. The rent was due on 4/20/2001.

A late fee of \$15.00 has been charged to your account. An additional \$15.00 will be charged if your rent becomes 15 day(s) late.

If you have not already sent payment, please send your check today.

Sincerely,

Manager  
CMD DALLAS


Account Summary - Room #: 616

Item	Amount
Monthly Rent	\$29.95
Rent	\$29.95

To return to the RENTAL AGREEMENT page from the GENERATED LETTERS page, click **Back** or press ALT + B.

#### Viewing and adding customer notes



Customer notes can be added at any time by clicking on the yellow note pad with the paper clip icon  in the upper, right corner of the RENTAL AGREEMENT page.

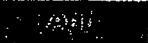
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The  
CONTRACT  
NOTES page  
has two  
sections. The  
top, or  
EXISTING  
NOTES  
section  
contains all  
notes that  
have been  
added life-to-  
date. The ADD  
A NEW NOTE  
section  
enables you to  
add another  
note when  
necessary.

Contract Notes	
<div>Existing Notes <span>Critical Notes <input checked="" type="checkbox"/></span></div> <div>**4/23/2001(BARBARA DELAHOYDE)990019 - Customer needs assistance getting into his room. Has arthritis and cannot handle the lock by himself.</div>	
<div>Add A New Note</div> <div></div>	
<div><div>(Access Key: B)</div><div>(Access Key: A)</div></div>	

**Note:** Existing notes cannot be retrieved and edited. They become a historical record as soon as they are added.

**To add a note:**

1. Start typing in the space provided under ADD A NEW NOTE field.
2. If the note must be read each time you retrieve this customer's contract, click on the CRITICAL NOTES check box in the upper, right corner of this screen.
3. Click  or press ALT + A to add the note to EXISTING NOTES. The note redisplay in the EXISTING NOTES area of the page.



If you checked the CRITICAL NOTES check box on this page, once you return to the RENTAL AGREEMENT page you will find a new name, CRITICAL NOTES, in place of NOTES.

CRITICAL  
NOTES is now  
a selection on  
the RENTAL  
AGREEMENT  
page.

CONTRACT BALANCE DUE: (\$980.82) ACCOUNT TYPE: INDIVIDUAL CONTRACT NO: 990019-00000122

!! Customer Information
!! Alternate Contact
!! Authorized Access Person(s)
!! Room Information
!! Services
!! Credit Card Payment Plan - Optional
!! Payment Ledger
!!

Cancel contract (Access Key: C)    Show (Access Key: S)

This selection flashes **white** and **black** to draw your attention to it. Each time you recall a contract and see CRITICAL NOTES on the RENTAL AGREEMENT PAGE, make sure to read the notes before continuing.



You can also access customer notes by clicking on the NOTES or CRITICAL NOTES hypertext link on the RENTAL AGREEMENT page.

### Viewing customer's ledger



To view a customer's ledger using the mouse:

1. Click on **!! Payment Ledger** to go to the ACCOUNT LEDGER page from the RENTAL AGREEMENT page.



To view a customer's ledger using the keyboard:

1. Press TAB until the cursor is over **!! Payment Ledger**
2. Press ENTER to go to the ACCOUNT LEDGER page.

The  
ACCOUNT  
LEDGER page  
has several  
important  
features. The  
SHOW ME,  
ORDER and  
SHOW  
ROOMS drop-  
down list box,  
provide you  
with different  
views of the  
customer  
information.

Account Ledger									
Contract No: 990019-00000122					Customer: TERRY DAVIS				
Show Me	Order			Show Rooms	Balance Due				
30 Days	Ascending			ALL	\$0.00				
PAID	DUE	THRU	ROOM DESCRIPTION	RATE	QTY	TAX	TOTAL	BALANCE	
✓ 2/13/2001	3/12/2001	939	RENT	\$19.99	1	\$1.60	\$21.59	\$21.59	
✓ 2/13/2001	3/12/2001	943	RENT	\$19.99	1	\$1.60	\$21.59	\$43.18	
\$ 2/13/2001			CASH				(\$43.18)	\$0.00	


\$ = View Payment Detail    ✓ = Paid In Full    ⊖ = Reversed Charge

Take Payment (Access Key: T)    Main (Access Key: M)

information.



To change the display order on the ACCOUNT LEDGER page using the mouse:

1. Click on the  to view the list.
2. Click on one of the selections. The application automatically provides you with the detail in the format you select.

Note: All charges paid-in-full have a check mark in the PAID column.




To change the display order on the ACCOUNT LEDGER page using the keyboard:

1. Press TAB to highlight the selection.
2. Press DOWN ARROW to view this order.
3. Repeat steps 1 and 2 until you get to the order you want to see.






On the ACCOUNT LEDGER screen, click on the \$ (payment) to the left of a payment to view the PAYMENTS page. This page shows what charges were included with the specific payment.

Note: The  (reversal) items reflect fees that were waived. Both the charge and reversal of charge display as a historical record of the action taken.

### Printing previous customer receipts

The PAYMENTS page also provides a way of printing prior receipts.

Notice the  letter icon in the upper-left corner of the page for each payment.

Payments						
	TYPE	ACCOUNT NO	EXP DATE	AUTH CODE	PAY DATE	AMOUNT
	CASH		/		2/13/2001	\$43.18
TOTAL:						\$43.18

Above Payments Covered These Charges					
ROOM	SIZE	DESCRIPTION	RECORD DATE	PAID THRU	FEE
939	5X5X8	RENT	2/13/2001	3/12/2001	\$21.59
903	5X5X8	RENT	2/13/2001	3/12/2001	\$21.59
TOTAL:					\$43.18
DIFFERENCE OF:					\$0.00

 = View And Print Receipt

  
(Access Key: B)

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### To review a prior receipt using the mouse:


1. Click on the icon for the receipt you want to review or reprint.




### To review a prior receipt using the keyboard:

1. Press TAB until the cursor is over the icon.
2. Press ENTER to review.

## U-HAUL SELF STORAGE

Click  on the menu bar to reprint the receipt.

Click  at the bottom of this page, or press ALT + O to close the receipt and return to the ACCOUNT LEDGER page.

Customers Receipt No:  
990019-00000107-001  
TERRY DAVIS  
5522 N. 67TH AVENUE  
GLENDALE, AZ 85302  
(623)918-9283

Tuesday - 2/13/2001 - 2:38:45 PM

CMD DALLAS, 990019  
920 MEYERS ROAD  
GRAND PRAIRIE, TX 75050  
(000)000-0000

ROOM	DESCRIPTION	THRU	PAID	AMOUNT
939	5X5X8 SC-10 2 SINGLE NOCLIMATE	3/12/2001	✓	\$19.99
903	5X5X8 SC-10 2 SINGLE NOCLIMATE	3/12/2001	✓	\$19.99
Paid Total:				\$39.98
UnPaid Total:				\$0.00
Tax TX 8.00%:				\$3.20
Fee Total:				\$43.18
CASH				\$43.18
Payment Total:				\$43.18
Account Balance:				\$0.00

### To return to the RENTAL AGREEMENT page from the ACCOUNT LEDGER page:

1. Click  or press ALT + M.



If you are working on completing a move in contract, click [here](#) to continue the move in process.



If you are reading this section for the first time, and are not completing a move in, you may want to start learning contract processing by doing a move in. Click [here](#) to go to the top of the MOVE IN instructions page.


## Checking for open contracts




The application provides you with a way of maintain contracts in their present state even if you exit the contract the wrong way.



The proper way to complete a contract includes one of two procedures:

 Use this button to cancel a contract.

- On a brand new contract, such as a RESERVATION or MOVE IN, when you click this button all information you entered is deleted.
- On an existing contract, such as from the VIEW CONTRACT, MOVE OUT, or TAKE A PAYMENT selections, when you click on this button all information you entered for this session is deleted. The contract in its original form remains on the database and can be recalled at any time.

 Use this button to save a contract. This is the only way information entered on the contract is saved. If you exit in any other way, you may loss information that was input during this session.

- From the RESERVATION page if you are doing a QUOTE or CONFIRMED reservation, you must click this button in order to save the contract and create a receipt.
- From the RENTAL AGREEMENT page on MOVE INS, MOVE OUTS, TRANSFERS, and PAYMENTS (TAKE PAYMENT) after entering all information including collecting payment you must return to this MAIN page and click this button to complete the contract and create a receipt.



If you exit the contract in any other way, the contract remains open under your user ID and cannot be recalled by anyone else.

For this reason, it is important for you to periodically click the OPEN CONTRACT from the HOME page to make sure you have close all contracts correctly.

## Current Customers

### Open Contracts

#### To check for open contracts:

1. Click on OPEN CONTRACTS on the HOME page.

or

Press TAB until the cursor is over OPEN CONTRACTS. Press ENTER to

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select.

If all your contracts have been completed properly, the OPEN CONTRACTS page looks like this.

BARBARA DELAHOYDE Has These Contracts Open		
NUMBER	TYPE	NAME
No Contracts Open		

☒ = Recalls contract

(Access Key: B)

There are no contracts open in the above example. To return to the HOME page click  or press ALT + B. No other action is needed.


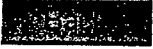





If a contract or contracts were closed improperly or were left open, the contract information appears on the OPEN CONTRACTS page.

BARBARA DELAHOYDE Has These Contracts Open		
NUMBER	TYPE	NAME
<input checked="" type="checkbox"/> 990019-00000000	INDIVIDUAL	MACHACA ABDULA
<input checked="" type="checkbox"/> 990019-00000071	INDIVIDUAL	BARBARA VON OPPENFELD

☒ = Recalls contract

(Access Key: B)

#### To recall an open contract:

1. Click on the blue-arrow icon  next to the contract. This recalls the contract and displays the page you were on when you closed it improperly.
2. Click  or  until you are on a page where  or  displays.
3. Click on the  button if you want to cancel the contract.  
or  
Complete the remaining steps of the contract and return to the RESERVATION or RENTAL AGREEMENT page, click on  to complete the contract.



Once you have completed or cancelled a contract, return to the OPEN CONTRACTS page. Press F5 to refresh the page. This removes the contract you properly closed from the list. Repeat the above steps for each of the open contracts listed.



The CLOSING PROCESS cannot be done if contracts are left in open status. Make sure you check for open contracts before you clock out at the end of your shift.

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## Completing a reservation quote



With *WebSelfStorage* you can complete reservation quotes for your customers. A quote is a communication between you and a customer who is inquiring about the availability of a room or rooms and the cost associated with the rental. The customer does not provide a deposit with this type of exchange.

The procedure for completing a quote and confirmed reservations are identical up to the point where you collect a deposit.

A quote can be turned into a confirmed reservation by recalling the contract and collecting a deposit.

Read this section to understand how to complete a reservation. When you get to the end of the QUOTE procedure in this section, you will find a link to the CONFIRMED RESERVATION. This will take you to the procedure on collecting payment and completing the confirmed reservation.

In this section of the manual we review:



Contract location pointers

Repeat customer search

Add a new customer

Select an entity from the state list

Entity specific screen

Change a quote to a confirmed reservation.



**To begin a reservation using the mouse:**

1. Click RESERVATION under NEW CUSTOMER on the MAIN MENU.



**To begin a reservation using the keyboard:**

1. Press TAB until the cursor is over RESERVATION.
2. Press ENTER.

Click the city  
the customer  
wants to rent  
from.

If you want to  
return to the  
LOCATION  
page, click  
or press ALT  
+ B.

Customer	Location	Room	Move-In Date	Payment
↑				
<b>AZ - Choose A City From The List Below</b>				
	<u>CHANDLER</u>	<u>COTTONWOOD</u>	<u>GILBERT</u>	
	<u>GLENDAL</u>	<u>MESA</u>	<u>PEORIA</u>	
	<u>PHOENIX EAST</u>	<u>PHOENIX WEST</u>	<u>SCOTTSDALE</u>	
	<u>SURPRISE</u>	<u>TEMPE</u>	<u>TUCSON</u>	
	<u>YUMA</u>			

(Access Key: M) (Access Key: B)

The list of  
centers for this  
city displays.

Notice the  
icons to the left  
of each city. If  
the icon is a  
blue-arrow, you  
can select  
the center by  
clicking on this  
icon.

Customer	Location	Room	Move-In Date	Payment
↑				
<b>GLENDAL, AZ - Choose A Location From The List Below</b>				
%OCC	ENTITY NAME	ADDRESS	PHONE	
100.00% ■	721058 U-HAUL 51ST & GLENDAL	5024 WEST GLENDAL AVENUE	(602)238-9841	
100.00% ■	721061 U-HAUL CENTER 67TH & BELL	6544 WEST BELL ROAD	(602)238-9880	
100.00% ■	882056 U-HAUL STORAGE CACTUS & 51ST	12280 NORTH 51ST AVENUE	(602)938-4472	

■ = Entity Does Accept Remote Reservations    ○ = Entity Does Not Accept Remote Reservations

(Access Keys: M) (Access Keys: B)

If the icon is a red not-sign ○, the entity does not accept remote reservation. If the customer wants to complete a reservation at this center, he or she may want to call the center directly.

Below is an  
example of the  
same page  
with red and  
green squares

%OCC	ENTITY
100% ■	828039
5.56% ■	828061
100% ■	828068
100% ■	883049

There are several other visual cues on this page.

Notice the small green, yellow and red square boxed to the right of the occupancy percentage for each location. The color of the square is your cue to help the customer make an informed decision on the location they want to rent from. The percentage gives another indication of how likely the customer will find a room at this particular center.

- If the box color is green, the storage facility has rooms available for rent. This is a good center to direct a customer to.
- If the box color is yellow, the storage facility has rooms available, but it is not certain that the room the customer is quoted will be available at the time they want to rent the room.
- If the box color is red, the storage facility has very few rooms available to rent. If the center is at 100% occupancy, it is unlikely that a room will be available when the customer wants to rent it.

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